

WEALTH OVERVIEW

When you see the full picture, the path forward is clear



As a Merrill Lynch Investment Advisory Program client, you receive personalized advice from your dedicated Merrill advisor. You'll also periodically receive Wealth Overview, giving you deeper insight into your relationship with us. This new view will be sent as part of reports that Merrill provides or as a personalized video that your advisor can send.



Wealth Overview enables you to:



See accounts in a single view

You can easily see all of your Merrill investment advisory and brokerage, Bank of America banking, and external accounts,¹ so you can make more informed decisions to help you pursue your goals.



Gain deeper insights

Each report gives you a snapshot of your accounts and a detailed view, including recent performance, of your Merrill Lynch Investment Advisory Program accounts.



Access easily and securely

After being sent by your advisor, your personalized report or interactive video can be accessed through MyMerrill — making it easier to access information when you want.



Stay connected with your advisor

Wealth Overview is another way you and your advisor can measure the progress you are making and will help you have even more productive planning discussions.

To see how Wealth Overview can help give you a clear picture of your wealth, connect with your Merrill advisor.

¹ Accounts at other institutions are only included in your Wealth Overview if you choose to share that information.

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed, or provided by companies that are affiliates of Bank of America Corporation ("BoFA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BoFA Corp.

Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
-----------------------------	--------------------------------	-----------------------

IMPORTANT DISCLOSURES

This material does not take into account a client's particular investment objectives, financial situations or needs and is not intended as a recommendation, offer or solicitation for the purchase or sale of any security or investment strategy.

You can choose from one or more programs and services based on your individual objectives, investment style, need for ongoing advice and interest in particular investment solutions. One of the options to consider is the Merrill Lynch Investment Advisory Program. For more information, you may review the Merrill Lynch Investment Advisory Program Brochure and please visit ml.com/programs-services.

The Merrill Lynch Investment Advisory Program is an investment advisory service sponsored by Merrill. Merrill offers a broad range of brokerage, investment advisory (including financial planning) and other services. There are important differences between brokerage and investment advisory services, including the type of advice and assistance provided, the fees charged, and the rights and obligations of the parties. It is important to understand the differences, particularly when determining which service or services to select.

Investing involves risk, including the possible loss of principal. Past performance is no guarantee of future results.

All recommendations must be considered in the context of an individual investor's goals, time horizon, liquidity needs and risk tolerance. Not all recommendations will be in the best interest of all investors.

© 2021 Bank of America Corporation. All rights reserved. | MAP3449446 | 0321 (ADA)

 To learn about Bank of America's environmental goals and initiatives, go to bankofamerica.com/environment.
Leaf icon is a registered trademark of Bank of America Corporation.